

6. Telephone number.
7. Social Security number.
8. Representative payee (RP) name (if applicable).
9. RP address
10. Current level of education
11. Whether pursuing education currently and at what level (*e.g.*, post secondary, continuing adult education, special education, vocational education)
12. Proposed educational goals
13. Primary diagnosis
14. Secondary diagnosis (if applicable)
15. Employer health care coverage at outset (if working)
16. Other health care coverage

#### Employment Information (Current and Proposed Goal—Where Applicable)

1. Self-employed or employee
2. Type of work
3. Beginning date
4. Hours per week
5. Monthly gross earned income
6. Monthly net earned income
7. Work-related expenses

#### Proposed Training Information

1. Work-related training/counseling program
2. Proposed other training

#### Benefits (Current and Expected Changes if Employment Goals Are Reached)

1. SSDI
2. SSI
3. Concurrent (SSDI and SSI)
4. Medicare
5. Medicaid
6. Private Health Insurance
7. Subsidized housing or other rental subsidies
8. Food Stamps
9. General Assistance
10. Workers Compensation benefits
11. Unemployment Insurance benefits
12. Other Federal, State, or local supports, including TANF (specify)

#### Incentives To Be Used

1. Trial-work period (TWP)
2. Extended period of eligibility (EPE)
3. Impairment-related work expenses (IRWE)
4. Plan for achieving self-support (PASS)
5. 1619(a)
6. 1619(b)
7. Medicaid buy-in provisions/Balanced Budget Act
8. Blind Work Expense
9. Student Earned Income Exclusion
10. Subsidy Development
11. Extended Medicare

#### Provisions To Be Used

1. Property Essential to Self-Support
2. Expedited Reinstatement of Benefits

3. Ticket to Work Program
4. Continuing Disability Review Protections
5. Section 301
6. Unsuccessful Work Attempt

#### Services To Be Used

1. Vocational Rehabilitation services
2. Paratransit services
3. Protection and Advocacy services
4. Work-related training/counseling program
5. DOL One-Stop Career Center services
6. Transitioning youth services (from school to post-secondary education or to work)

#### Monthly Benefits Planning, Assistance, and Outreach Activities Performed by Benefits Planning Organization

1. Number of SSDI/SSI beneficiaries (over age 18) requesting assistance (initial and repeat requests).
2. Number of SSDI/SSI beneficiaries (ages 14 to 18) requesting assistance (initial and repeat requests).
3. Number of new benefits management plans prepared.
4. Number of updated benefits management plans prepared.
5. Number of presentations given at forums, conferences, meetings, *etc.*

Additional information such as the time spent per recipient, the reason for service request, the level of service provided, and any anticipated employment status change of the beneficiary will also be reported by awardee. All data elements are to be collected in accordance with precise definitions to be provided by SSA as part of the application package. Adherence to such precise definitions is crucial to the comparability of the data across project sites.

The entities awarded a cooperative agreement under this notice shall submit quarterly progress reports to SSA, OAG. SSA expects that the project will need a period of time to begin providing services and collecting management information. Therefore, the first quarterly report shall include a description of the project, a status of data collection operations, actions that were taken, planned actions, and a description of how the project is addressing the needs of individuals with disabilities from diverse ethnic and racial communities, both in benefits planning and in carrying out outreach activities.

Subsequent reports shall provide: a status of the project, any problems or proposed changes in the project (*e.g.*, requests for technical assistance from contractor, interagency agreement change); specific information (baseline

data/program statistics) required by SSA, including that listed above; a description of how the project is addressing the needs of individuals with disabilities from diverse ethnic and racial communities, both in benefits planning and in carrying out outreach activities; actions that were taken, and planned actions. The quarterly reports shall be submitted to SSA, OAG, within 30 days after the end of the quarter.

SSA personnel (SSA Project Officer and/or other staff) expect to visit this project at least once. The SSA Project Officer shall review site operations, including collection of management information, and evaluate how projects are finding ways to make benefits planning, assistance, and outreach activities more effective in achieving SSA's Benefits Planning, Assistance, and Outreach Program goals.

Staff members shall attend an initial training meeting that will include an orientation session by SSA, and subsequent scheduled conferences at SSA headquarters or alternate sites chosen by SSA. Those meetings will provide the awardee of the cooperative agreement with the opportunity to exchange information with SSA and other awardees.

#### E. Evaluation

##### Process Evaluation

The purpose of process evaluation is for SSA and the awardee to assess how the project functioned and how the process might be altered to provide more efficiently and/or successfully the services required under section 1149 of the Act. The process evaluation will require both data collection and qualitative observational evaluation through site visits and/or project reporting.

##### Participant Experience

The goal of these cooperative agreements is the provision of services to enhance beneficiary awareness and understanding of SSA work incentives and thereby enhance beneficiaries' ability to make informed choices regarding work. The goal is not to provide employment services. Nevertheless, SSA is clearly interested in identifying participant outcomes under the Benefits Planning, Assistance, and Outreach Program to determine the extent to which participants achieve their employment, financial, and health care goals. Therefore, SSA is requiring that cooperative agreement awardees collect data regarding the employment status, benefit status, and income of beneficiaries before providing services under these cooperative agreements.